
LINKING REFERRALS TO INVESTIGATIONS

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Often times, multiple calls may come into CFSA in reference to the same family. If a new referral is created for a family being currently investigated, then FACES.NET allows workers to link that new accepted referral to an already open investigation. Linking the referral to an open investigation would close the current referral. The following tip sheet walks workers through the process of linking a referral to an investigation.



Pointers to Remember:

1. If a Referral is linked to an Investigation, then a new Investigation will not be opened;
2. All clients and allegations not in the “linked-to” referral will copy to the Investigation;
3. A worker may only link an accepted referral to an open investigation.

Steps Include:

Step 1: Navigate to the **CPS Outcome** screen. Place your mouse over the **Referral** module at the top of the screen.

Step 2: Place your mouse over the **CPS** menu item.

Step 3: Click on **CPS Outcome**.

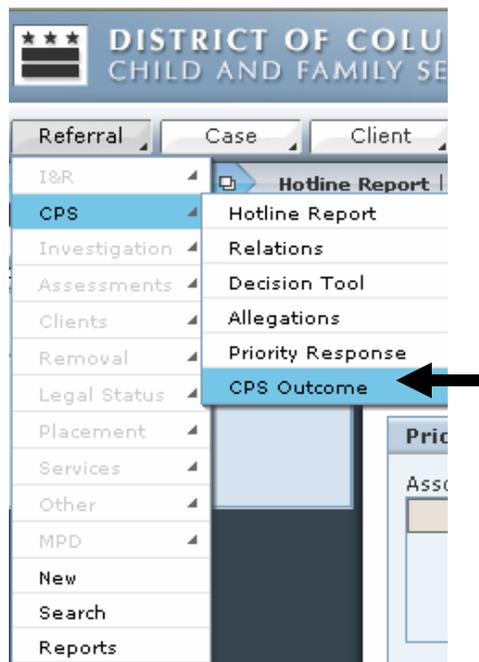


Figure 1

Step 4: On the **Referral Acceptance** screen, the worker has the choice to associate the referral to another referral or case, or link the referral to another investigation. Select the **Link to an open Investigation** radio button.

Step 5: Type the Referral ID number of the investigation to which you are linking the referral.

Step 6: Click **Save**.

The screenshot shows the 'Referral Acceptance' web application interface. On the left is a vertical sidebar with a 'In Focus' section containing user information: 'User Name: ADMIN TRAINER', 'Entity Type: Referral', 'Entity Name: TEST', and 'Entity ID: 586383'. The main content area is titled 'Referral Acceptance' and includes a 'View Notes' button. Below the title are input fields for 'Referral Date' (04/12/2006), 'Family Name' (Test), 'Outcome Date' (4/12/2006), and 'CPS Type' (General CPS). There are sections for 'Prior History' with sub-sections for 'Associated Referrals' and 'Associated Cases', each containing empty tables with headers. An 'Additional History' text area is also present. The 'Outcome' section has a table with columns for 'System Recommended Outcome', 'Final Outcome', and 'Response Time'. Below this are radio buttons for 'ACCEPT' and 'SCREEN OUT', followed by 'Reason' and 'Explanation' text areas. The 'Make Association or Link This Referral*' section contains four radio buttons: 'Do Not Associate', 'Associate with a Referral', 'Associate with a Case', and 'Link to an open Investigation' (which is selected). A 'Referral/Case ID*' field contains '586344' and a 'Find' button. The 'Narrative and Comments' section has a large text area for 'Narrative of Alleged Maltreatment' and smaller text areas for 'Worker Comments' and 'Supervisor Comments'. At the bottom, there are fields for 'Worker Assigned to Investigation' (TRAINER, ADMIN), 'Program Area' (FACESNET TRAINING), and 'Unit' (Training A). A row of buttons at the bottom includes 'Save', 'Approval', 'Override', and 'Cancel'. Four callout boxes with arrows point to specific elements: '4: Select the Link to an open Investigation radio button.' points to the selected radio button; '5: Type the Investigation number to which you are linking.' points to the 'Referral/Case ID' field; '6: Click Save.' points to the 'Save' button; and '7: Click Approval button.' points to the 'Approval' button.

Figure 2

Step 7: Click the **Approval** button to request and obtain approval.

Step 8: Read the message that appears: “On Supervisor approval, this referral will be linked to an open investigation. This will copy clients and allegations from this referral into the primary open investigation and it will not create a separate investigation for this referral. This action cannot be undone. Do you want to proceed?” (See **Figure 3**) Click **Yes** to follow through with the linkage.

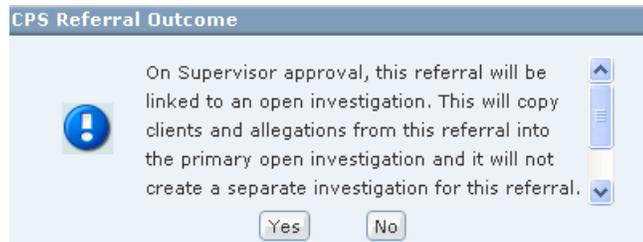


Figure 3

Step 9: A message will proceed stating that a snapshot of the referral was taken. Click **OK**.



Figure 4



Note:

- Linking a referral to an investigation is an irreversible process, so please be certain that the appropriate investigation number is entered, and that linking is indeed the action you want to take.

Step 10: Click the link under **Associated Referrals**. Once the referral acceptance is approved, the link of the investigation just “linked to” is listed under to the **Associated Referrals** section of **Prior History**. Therefore, even though the current referral is now closed and read-only, workers can still navigate to this **CPS Outcome** screen to see the referral acceptance snapshot of the investigation to which it was linked.

Click link to see referral acceptance snapshot of the “linked to” investigation.

Prior History						
Associated Referrals						
Refer Id	Family Name	Referral Type	Worker Name	Open Date	Close Date	Case ID
586344	JACKSON69	CPS	TRAINER, ADMIN	01/12/2006		No associated c

Figure 5